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MONTANA TOURISM
MARKETING DEVELOPMENT PLAN

VOLUME III

SIZE AND COMPOSITION OF THE CURRENT MARKET

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MONTANA TOURISM
MARKETING DEVELOPMENT PLAN

VOLUME III

SIZE AND COMPOSITION OF THE CURRENT MARKET

Prepared For:

MONTANA TRAVEL PROMOTION UNIT

December 1980

Prepared By:

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#140-02-80

PREFACE

This report covering the marketing research and resulting planning recommendations is issued in three volumes as follows:

Volume I: The Tourism Product And How It Is Viewed. This volume reports the results of the research efforts undertaken concerning what Montana has to offer and how tourists and the trade view it as a vacation destination.

Volume II: Management Summary And Recommendations. This volume summarizes the findings and presents the recommended marketing development plan.

Volume III: Size And Composition Of The Current Market. This volume presents projections of current visitor flows as derived from the surveys of the United States and the Canadian prime markets.

In addition, detailed tabulations of the survey data from the U.S. prime market and the Canadian prime market have been provided under separate covers.

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INTRODUCTION

INTRODUCTION

A. Purpose

The numbers presented in this volume were developed as one portion of a study that outlines a plan for public and private development of domestic and international tourism in Montana. The scope of this project includes all aspects of the tourism marketing efforts -- advertising, merchandising, strategic planning, product development, and the like. Our goal is to provide Montana with a workable, attainable program for taking advantage of its tourism potential in order to improve the economic well-being of the state.

B. Method

Part of this study includes probability-based telephone surveys of the two key drive-in Montana markets: neighboring U.S. states and nearby Canada (Edmonton and Calgary). These two areas are designated as the "prime market." The U.S. areas include:

...Northern California

...Oregon

...Washington

...Idaho

...Utah

...Wyoming

...Colorado

...North Dakota

...South Dakota

...The Minneapolis/St. Paul SMSA

The results of these interviews with 505 U.S. tourists and 100 Canadian tourists provide a basis for estimating the incidence of households currently living in these areas who visited Montana during the previous 12 month period.

For a more detailed statement of methodology, refer to Volume I.

This volume presents the projections developed from these two surveys. We then look at several special markets. In total, these data describe the existing tourism flow into Montana -- the base from which growth must occur.

Please note that the figure for total tourism flow must be taken as an estimate only. Several segments including tourists who live in areas of the United States or Canada outside of the prime markets were not studied. Estimates of this flow involve judgment and the use of Old West Regional Commission data. In addition, note that these figures refer only to non-resident tourism. Montana residents vacationing in their own state are not included, although they do represent a source of tourism.

C. Terminology

Several terms used extensively in this report have specific, technical meanings. In order to increase the ease with which they can be understood and used, we will define them here:

...Tourist -- an individual who has in the past year participated in a pleasure trip lasting at least one night away from home.

...Prime market -- the states, cities, or other areas in which tourists were interviewed in this study. The areas were selected for study due to their potential impact on Montana tourism due either to population, proximity, and/or past visitation to Montana. Their selection for interviewing does not necessarily imply that they are the best targets for promotion of Montana. However, they are potentially important enough to be examined.

...Pleasure trip -- a trip lasting at least one night away from home whose purpose is for recreation, visiting friends and relatives, and the like.

...Travel -- use of transportation for any purpose, including business or personal necessity. It includes tourism, but is wider than tourism alone.

...Visitation -- pleasure travel, or tourism.

...Trip night -- a night spend away from home on a pleasure trip. Five tourists in a group spending one night away from home on a vacation trip are counted as five trip nights.

...People trip -- one person taking one pleasure trip, in other words, a tourist. One individual who takes three pleasure trips per year contributes three people trips. Thus, ten tourists (people who take pleasure trips) who each take two such trips account for 20 people trips.

...Tourist household -- a household in which at least one member takes a pleasure trip lasting one night or more away from home in the past year. Tourist households were the unit measured in this study, and the number of household tourists in each was used to estimate the number of tourists in total. Thus, three tourist households in which 1.5 tourists participated in four pleasure trips on the average would contribute 18 people trips ($3 \times 1.5 \times 4 = 18$).

D. Organization

We will examine in this volume the non-resident tourism flow into Montana. As part of that examination, we will consider:

...How many tourists, trips, trip nights, etc. contribute to the current level of tourism in Montana; and

...What the tourists are like -- their origins, demographic and socioeconomic characteristics; and

...The characteristics of their Montana trip.

We will conduct our examination by looking in separate chapters at the:

...Size of the total tourism market;

...U.S. prime market;

...Canadian prime market;

...Nature of Montana trips; and

...Characteristics of Montana tourists from the prime market.

Now let's look at the findings.

THE FINDINGS IN DETAIL

I. OVERVIEW OF CURRENT TOURISM MARKETS

Introduction

In this section we will briefly examine the estimated number of:

...All non-resident travelers to Montana;

...Tourists from all sources;

...U.S. prime market tourists;

...Canadian prime market tourists; and

...Tourists from other sources.

In the past year, somewhat more than 2.5 million tourists are estimated to have visited Montana. The majority of these are from the U.S. prime market and the Canadian prime market.

...Based on the Old West Regional Commission survey and the Montana Department of Highways road traffic counts, Western Analysis, Inc., estimates that there were nearly 3.5 million non-resident visitors to Montana in 1979. Some of these visitors came to Montana for business rather than pleasure, and therefore are not considered tourists. Since the proportion of the total traffic flow contributed by travelers on business varies by season, we need to estimate the non-business travel using a seasonally-weighted average annual proportion of all non-resident travelers who are visiting Montana for reasons other than business.

Using the counts compiled by the Department of Highways of non-resident travelers visiting Montana in each season, and noting the proportion of non-resident travelers who say business is a purpose for their trip to Montana in each season in the Old West survey, the seasonally-weighted average proportion of non-business travel among non-resident visitors is calculated to be 77%. This represents approximately 2.5 million (2,675,000) non-resident visitors. Such a figure serves as an estimate of total tourism in Montana if we consider all non-business travel to be for pleasure reasons, such as visiting friends and relatives or recreation. Total tourism also includes both travelers whose prime trip goal is Montana and those who are "passing through" Montana to or from a non-Montana primary trip destination. Of course, this in only a rough estimate, but it provides a necessary starting point for marketing planning.

...Using the methodology presented in the Introduction of Volume I, Davidson-Peterson Associates, Inc. conducted a survey among households in the U.S. and Canadian prime markets to determine the incidence of tourist households and the proportion of households that took pleasure trips to or through Montana in the past year. Based on these surveys, Davidson-Peterson Associates estimates that there were over 1.5 million tourists from the U.S. prime market and over one-quarter million tourists from the Canadian prime market in the past year. In total, then, the prime market from both countries accounted for slightly under 2 million tourists to Montana, or 72% of the total tourist flow.

...The difference between the number of tourists from all sources and the number of tourists from the prime market is an approximation of the number of tourists from other markets -- about three-quarter million tourists, or 28% of all tourists to Montana. This includes tourists from parts of the United States and Canada outside the prime market as well as those from foreign countries. Of course, these estimates do not include tourists who live in Montana -- that is, resident tourists.

...It should be noted that the most reliable numbers in these estimates are the ones which are generated from a single source. Davidson-Peterson estimates of prime market tourists from the U.S. and Canada are in this category. Other estimates are somewhat less reliable because they depend on a combination of different sources which usually are not directly comparable. For example, the estimate of all non-resident travelers has been reliably computed by Western Analysis, but its accuracy is based on Old West Regional Commission as well as Department of Highways data. Also, the estimates based on combinations of these figures, such as the number of tourists from non-prime markets, are similarly less reliable.

Now let's look at the prime market in detail.

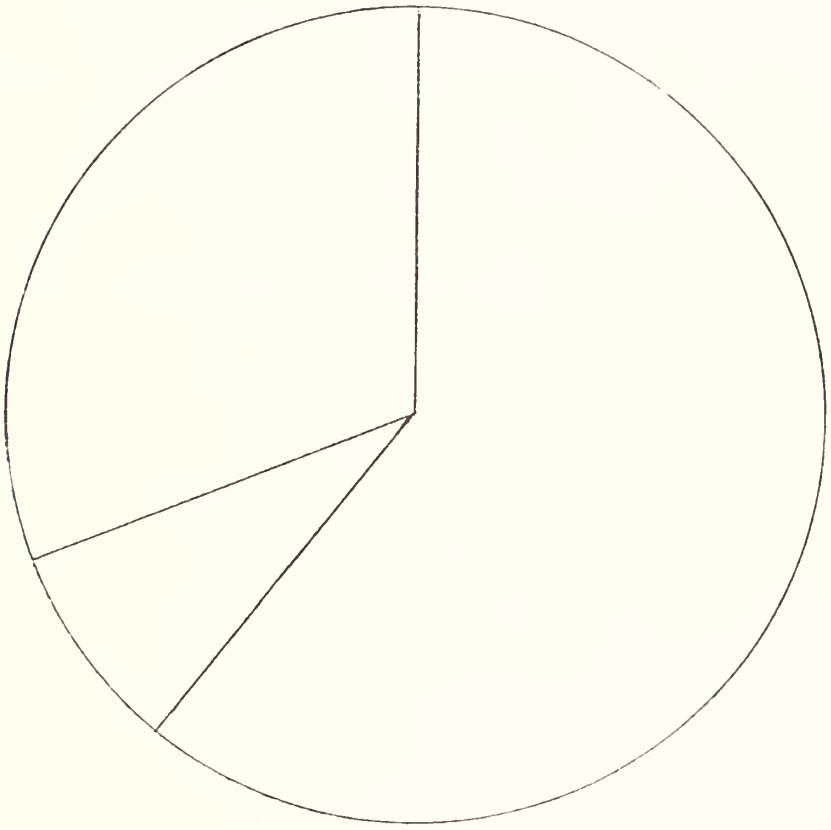
ESTIMATED ANNUAL NUMBER OF TOURISTS FROM
MONTANA TOURISM MARKETS

100%
GRAND TOTAL

2,675,000 TOURISTS

28%
OTHER
MARKETS

743,000
TOURISTS



62%
U.S.
PRIME
MARKET

1,652,000
TOURISTS

10%
CANADA PRIME
MARKET

280,000
TOURISTS

II. U.S. PRIME MARKET

Introduction

As was noted earlier, the U.S. prime market consists of the states and areas which have traditionally supplied large proportions of Montana visitors. We will consider:

...Size of the market in further detail; and

...Where the tourists come from.

A. Size Of The Market

On the following pages, four measures of tourism to Montana will be explained and examined. They are:

...People trips;

...Households visitation;

...Number of trips; and

...Trip nights.

Each of these terms is defined in the Introduction.

Data on all four measures are presented for:

...Total in the prime market;

...Total for Montana trips;

...Number for trips to Montana as the primary destination; and

...Number for trips to Montana as the secondary destination.

Rows in the tables labeled "primary trips" refer to those on which the destination objective of the pleasure trip is Montana. Rows with "secondary destination" are those referring to trips on which the primary destination is not Montana. These two rows often do not add to the total of all Montana trips since some of those who took primary trips also took secondary trips to Montana.

People trips is a measure of tourism composed of the number of individuals taking tourist trips times the number of trips taken.

Tourists in the U.S. prime market took approximately 36 million people trips in the past year. This represents roughly 17 million trips with an average of 2.15 people on each trip.

Of all these people trips, somewhat over 1.5 million, or 5% of the total, were people trips which went to or through Montana. By far, most of the tourists to Montana were only passing through the state (80%) of all Montana tourists.)

Somewhat fewer people on the average went on pleasure trips to Montana (1.97) than went on similar trips to any destination from the U.S. prime market (2.15 people per trip). This difference reflects the low incidence of Montana as a primary destination.

PEOPLE TRIPS FROM U.S. PRIME MARKET

	Estimated Number	% All People Trips	% Montana People Trips	Average # People/ Trip
Total number of prime market people trips	36,462,000	100%	-	2.15
Total People Trips To Montana	1,652,000	5%	100%	1.97
Primary destination people trips	327,000	1%	20%	2.07
Secondary destination people trips	1,325,000	4%	80%	1.95

One of the measures that is used to calculate the number of people trips is the number of households that took past year pleasure trips and went to Montana.

In the U.S. prime market there are nearly 8 million households. About 4.5 million of these, or 57% of the total, took at least one pleasure trip lasting one night or more away from home in the past year.

Only one in nine (11%) of these tourist households took a pleasure trip to Montana.

Almost all of the households in which someone took a trip to Montana went on secondary trips (93%). Only about one-quarter of them (27%) took primary trips to Montana.

HOUSEHOLD VISITATION FROM U.S. PRIME MARKET

	Estimated Number	% Of All Households	% Of Tourist Households	% Of Montana Tourist Households	# Trips/ Households	
Total households	7,812,000	100%	-	-	2.17	
Tourist households	4,463,000	57%	100%	-	3.80	
Households visiting Montana	486,000*	6%*	11%*	100%*	1.73	
Households taking primary destination trips	133,000	2%	3%	27%	1.20	**
Households taking secondary destination trips	451,000	6%	10%	93%	1.51	**

*Percentage of households taking primary trips plus those taking secondary trips to Montana exceeds the percentage of households taking any trip to Montana since many households originated both types of trips.

**Average number of Montana trips per household taking type of trip listed (any trip to Montana, primary trip, or secondary trip)

Another measure which is used to calculate the number of people trips is, understandably, the number of trips taken. Here, a trip is a single event when one or more members of a household traveled for pleasure.

In the past year, tourists in the U.S. prime market took almost 17 million pleasure trips lasting one night away from home or longer. One trip in twenty (5%) went to or through Montana.

Again, most of these trips are ones that pass through the state rather than ones that go to the state.

TRIPS FROM U.S. PRIME MARKET

	Estimated Number	% Of All Trips
Total number of trips	16,958,000	100%
Total trips to Montana	840,000	5%
Primary destination trips	160,000	1%
Secondary destination trips	680,000	4%

The final measure of tourism is the number of trip nights spent in Montana. A trip night is defined as one person spending one night in Montana on a pleasure trip. This measure indicates the lodging used by tourists in Montana, and is therefore an indicator of key economic benefits from tourism.

Tourists in the U.S. prime market spent almost 100 million trip nights away from home on pleasure trips in the past year. However, only about 3 million trip nights were spent in Montana. The proportion of the total accounted for by Montana (3%) is much lower on this measure than others because most of the trips to Montana are secondary destination trips on which far fewer nights per trip are spent in Montana than on primary destination trips (2.73 vs. 6.60 nights per trip in Montana).

TRIP NIGHTS FROM U.S. PRIME MARKET

	Estimated Number	% Prime Market Trip Nights	Average # Trip Nights
Total number of prime market trip nights	99,037,000	100%	5.84
Total Montana trip nights	2,908,000	3%	3.46*
Montana trip nights on Montana primary trips	1,052,000	1%	6.60
Montana trip nights on Montana secondary trips	1,856,000	2%	2.73*

* NOTE: These averages should not be compared with those for all prime market trips or Montana primary trips since they include secondary trip data.

B. Origin Of U.S. Prime Market Tourists

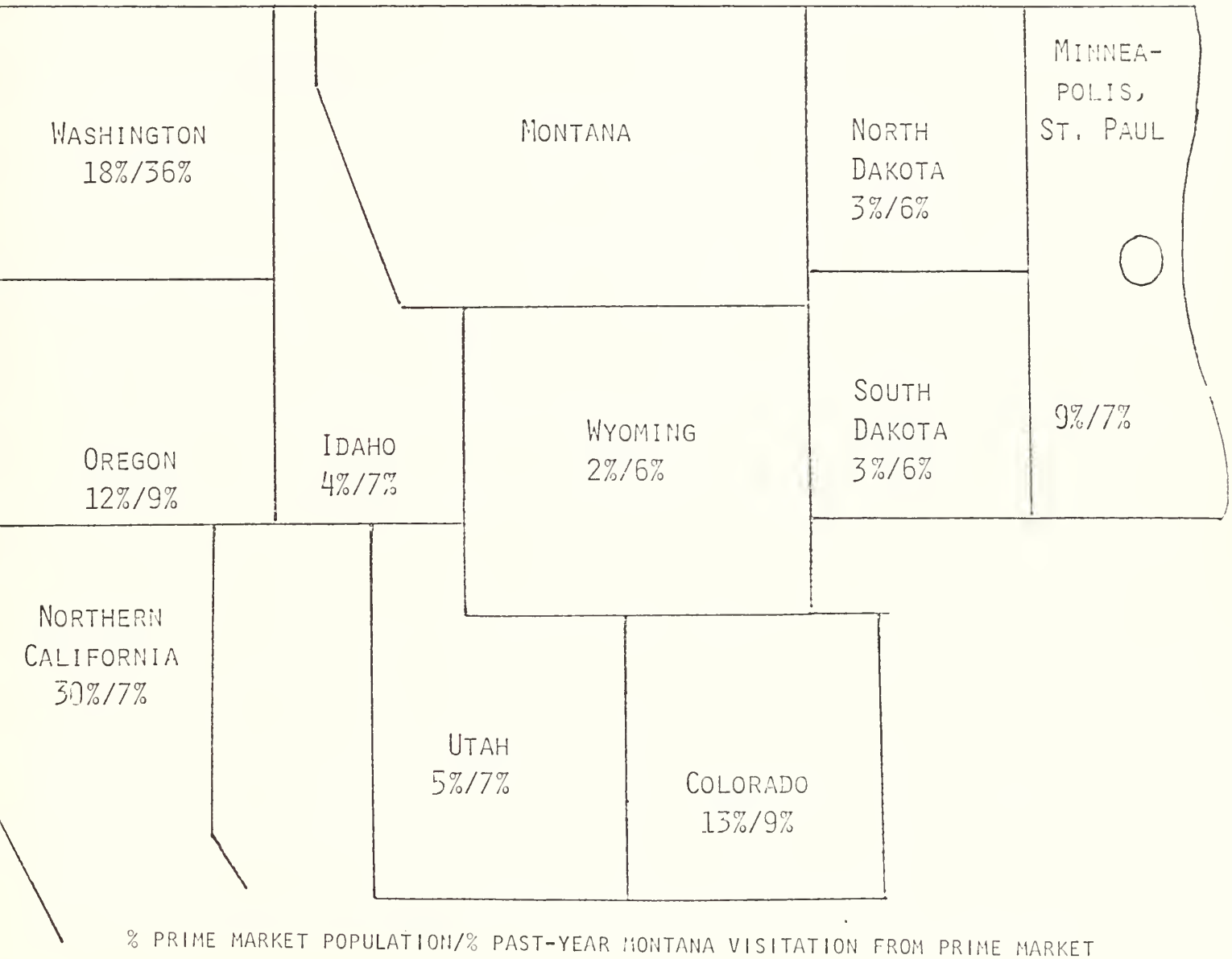
Compared with the proportion of prime market population in each state, the proportion of past-year Montana visitors contributed by Washington is quite large and the proportion from northern California is relatively much smaller.

...While only 18% of the prime market lives in Washington, fully twice that proportion of Montana visitors -- one-third of the prime market total (36%) -- are from the state.

...In contrast, northern California (the portion from San Francisco and north) accounts for more than one-quarter of the prime market population (30%). However, only one-fourth that proportion (7%) of the past-year Montana visitors come from that area.

...Not surprisingly, the states adjacent to Montana contribute somewhat higher proportions of visitors compared with their populations.

POPULATION AND PAST-YEAR MONTANA VISITATION IN U.S. PRIME MARKET



% PRIME MARKET POPULATION/% PAST-YEAR MONTANA VISITATION FROM PRIME MARKET

NOTE: Compares proportion of prime market population in each state (based on Sales & Marketing Management 1980 Survey of Buying Power estimates) with proportion of tourists from prime market who visited Montana on pleasure trip in past year as a primary or secondary destination; base for past-year visitation is 55.

III. CANADIAN PRIME MARKET

Introduction

The Canadian prime market consists of tourists living in the Alberta metropolitan areas of Calgary and Edmonton. We will look at the:

...Number of tourists, tourist households, and other measures of tourism to Montana; and

...How many tourists come from either Alberta region.

A. Size Of The Market

Data presented in this section are comparable to those presented in the last chapter for the U.S. prime market. For information about the meaning of the terms and the presentation of data see the introduction.

Of the two million people trips taken by tourists in the Canadian prime market last year, a much higher proportion of them (13%) went to Montana than was true in the U.S. prime market (5%). However, this is understandable, since the Canadian prime market is more geographically concentrated and closer to Montana than is the U.S. prime market. In total, then, the Canadian prime market contributes almost 300,000 tourists per year.

As in the U.S. prime market, most of these people trips come from trips through Montana to somewhere else (68%) rather than to Montana as the primary destination (32%). However, the proportion contributed by primary trips is higher than it is in the U.S. prime market (20%).

On the average, there are more people on each Montana trip from the Canadian prime market (2.39) than from the U.S. prime market (1.97).

PEOPLE TRIPS FROM CANADIAN PRIME MARKET

	Estimated Number	% All People Trips	% Montana People Trips	Average # People/ Trip
Total number of prime market people trips	2,166,000	100%	-	2.39*
Total People Trips To Montana	280,000	13%	100%	2.39
Primary destination people trips	89,000	4%	32%	2.63
Secondary destination people trips	191,000	9%	68%	2.29

* Assumed equal to average number of people per trip on all Montana trips.

In the Canadian prime market of Calgary and Edmonton metropolitan areas are about 450,000 households. Somewhat more than half of these (54%) are ones in which someone has taken a pleasure trip lasting at least one night away from home in the past year. This provides a tourist market of almost 250,000 households.

One tourist household in five (19%) has gone to Montana in the past year for pleasure. Almost all of these 45,000 households took secondary destination trips to Montana (96%), and some of them took primary trips (38%). While this is an important market, its size is clearly not large.

HOUSEHOLD VISITATION FROM CANADIAN PRIME MARKET

	Estimated Number	% Of All Households	% Of Tourist Households	% Of Montana Tourist Households
Total households	447,600	100%	-	-
Tourist households	240,000	54%	100%	-
Households Visiting Montana	45,000	10%*	19%*	100%*
Households taking primary destination trips	17,000	4%	7%	38%
Households taking secondary destination trips	43,000	10%	18%	96%

*Percentage of households taking primary trips plus those taking secondary trips to Montana exceeds the percentage of households taking any trip to Montana since many households originated both types of trips.

Tourists in the Canadian prime market took some 900,000 trips in the past year. Somewhat over 100,000 of these, or 13%, were to Montana, either as a primary or secondary destination. This compares with 840,000 trips from the U.S. prime market. While the Canadian market is important, and has characteristics that offer substantial potential for development, it is clearly at present a much smaller market.

TRIPS FROM CANADIAN PRIME MARKET

	Estimated Number	% Of All Trips
Total number of trips	907,000	100%
Total trips to Montana	118,000	13%
Primary destination trips	34,000	4%
Secondary destination trips	84,000	9%

Tourists from the Canadian prime market spend about 425,000 trip nights in Montana. Understandably, those traveling to Montana as the primary destination spend one more trip night on the average in Montana than do tourists just passing through the state (4.3 nights vs. 3.3 nights).

TRIP NIGHTS FROM CANADIAN PRIME MARKET

	Estimated Number	% Prime Market Trip Nights	Average # Nights Per Trip
Total number of prime market trip nights	3,356,000	100%	3.59*
Total Montana Trip Nights	422,000	11%	3.59
Montana trip nights on Montana primary trips	144,000	4%	4.25
Montana trip nights on Montana secondary trips	278,000	7%	3.31

* Assumed to be equal to average number of trip nights on all Montana trips.

B. Origin Of The Market

Calgary represents a much larger part of the Canadian prime market than does Edmonton.

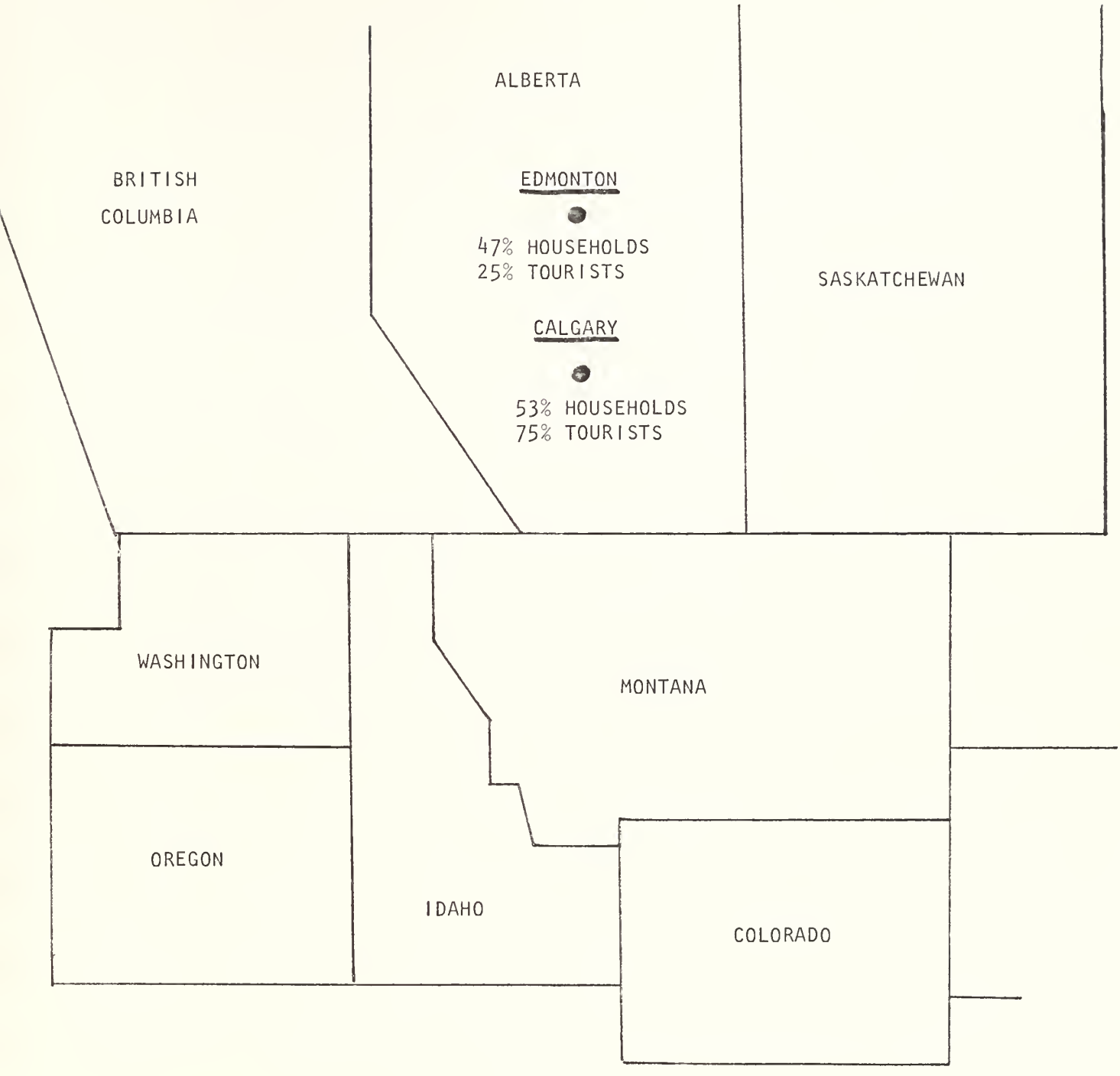
...Even though Calgary is only somewhat larger than Edmonton (690,700 vs. 609,200 households), many more of the Canadian prime market households that took pleasure trips to Montana came from Calgary (71%) than from Edmonton (29%).

...Similarly, Calgary contributes a far greater share of the tourists than does Edmonton (75% vs. 25% of people trips from Canadian prime market).

...In addition, an even greater proportion of primary trip Montana trip households (88%) and people trips (90%) originate in Calgary rather than Edmonton (12% households, 10% people trips).

Due to the small number of tourists who have visited Montana encountered in the Canadian sample, these numbers should be considered indicative rather than accurate estimates of the proportions of traffic from each area. Still, since the most obvious difference between Calgary and Edmonton is the difference in travel distance to Montana, it appears that we can conclude that this difference in distance accounts for greater visitation to Montana from Calgary than from Edmonton.

POPULATION AND VISITATION IN
CANADIAN PRIME MARKET



Shows proportion of Canadian prime market households in Edmonton and Calgary Metropolitan areas compared with proportion of tourists from each city.

IV. A LOOK AT PRIME MARKET MONTANA TOURISTS

Introduction

In this chapter we will look at the characteristics of tourists living in the U.S. and Canadian prime markets in general in comparison with those in these markets who have taken primary or secondary trips to Montana. This will enable us to see how Montana tourists are distinguished from tourists overall in demographic and socioeconomic characteristics -- in other words, in terms of "who they are." The purpose of this is to target marketing efforts.

A. Profile Of U.S. Prime Market Tourists

In the U.S. prime market, Montana visitors are more likely to be blue-collar workers than are tourists in general (44% vs. 29%) and less likely to be white-collar workers (34% vs. 56%). This blue-collar orientation appears consistent with the type of vacation experience currently associated with Montana by tourists in the U.S. prime market.

However, this occupational difference does not result in different educational or income profiles.

...Education -- they have approximately equal educational backgrounds overall; and

...Income -- the average total gross annual household income for both groups is about $23,000.

COMPARISON OF MONTANA AND ALL TOURISTS IN U.S. PRIME MARKET

	Total	Visited Montana
	%	%
Occupation Of Chief Wage Earner		
White-Collar (Total)	56	34
Professional	23	14
Managerial	18	13
Clerical/sales	15	7
Blue-Collar (Total)	29	44
Craftsman/foreman	13	18
Other	16	26
Retired	10	11
All other	2	5
No answer	3	6
Education Of Primary Trip Planner		
High school graduate or less	40	42
Some college	27	31
College graduate or more	31	27
Other	2	-
Average Total Gross Annual Household Income	$23,500	$22,400
BASE	505	55

Except for occupation, U.S. prime market residents who visit Montana are not distinguished demographically from tourists living in the prime market in general. Compared with all tourists, those who visit Montana are roughly equal in:

...Age -- both groups have an average age around 40 years;

...Living Situation -- Tourists in both groups are apt to be married, although Montana visitors are slightly less likely to be married and more apt to be living with other adults who are not family members;

...Children In Household -- four households in ten in each group have children at home; and

...Size Of Household -- average household size is about three persons in both groups.

In sum, U.S. prime market tourists who come to Montana do not appear to be segmented by demographic or socioeconomic characteristics from tourists in general except as was seen for occupation.

COMPARISON OF MONTANA AND ALL TOURISTS IN U.S. PRIME MARKET

	Total	Visited Montana
Average Age Of Primary Trip Planner	40.0	38.7
Living Situation		
Married and living with spouse	68%	60%
Living with parents or other family members	6%	6%
Only adult in household	17%	16%
Living with other adults/ not family members	10%	18%
Children		
Children present in household (net)	44%	42%
Household Size		
Average Number Of Household Members	3.1	3.1
BASE	505	55

B. Profile Of Canadian Prime Market Tourists

In the Canadian prime market, Montana visitors tend to be more upscale than tourists in general.

...Montana tourists are more apt to be white-collar than are Canadian prime market tourists overall (81% vs. 61%);

...They are somewhat more apt to be college graduates than tourists in general (43% vs. 29%); and

...Their average total annual income is slightly higher ($31,500 vs. $28,400).

Notice that U.S. prime market tourists who visited Montana are less apt to be white-collar than are tourists in the U.S. prime market in general, but the opposite is true in the Canadian prime market.

COMPARISON OF MONTANA AND ALL TOURISTS IN CANADIAN PRIME MARKET

	Total	Visited Montana
	%	%
Occupation Of Chief Wage Earner		
White-Collar (Total)	61	81
Professional	26	38
Managerial	25	29
Clerical/sales	10	14
Blue-Collar (Total)	29	14
Craftsman/foreman	17	9
Other	12	5
Retired	7	5
All other	3	-
Education Of Primary Trip Planner		
High school graduate or less	50	38
Some college	21	19
College graduate or more	29	43 ←
Average Total Gross Annual Household Income	$28,400	$31,500 ←
BASE	100	21*

* NOTE: Small base.

However, Montana tourists from the Canadian prime market are not distinguished from Canadian tourists overall in their other demographic characteristics.

...Montana tourists and tourists overall in the Canadian prime market are about equal in age;

...Their living situations are apt to be the same;

...The proportions with children in their households are identical; and

...The average household size is about the same.

COMPARISON OF MONTANA AND ALL TOURISTS IN CANADIAN PRIME MARKET

	Total	Visited Montana
Average Age Of Primary Trip Planner	36.3	39.7
Living Situation		
Married and living with spouse	65%	67%
Living with parents or other family members	10%	14%
Only adult in household	14%	10%
Living with other adults/ not family members	11%	10%
Children		
Children present in household (net)	38%	38%
Household Size		
Average Number Of Household Members	3.0	3.2
BASE	100	21*

* NOTE: Small base.

V. MONTANA TRIP CHARACTERISTICS

Introduction

In this chapter we will examine and compare the tourism patterns of tourists from the U.S. and Canadian prime market. We will look at:

...Number and destinations of their pleasure trips; and

...Activities and seasons of all pleasure trips and those to Montana.

A. Number And Destinations Of Trips

Compared with U.S. prime market tourists, Canadian tourists are more oriented towards extended trips and towards Montana, but they are not more likely to take extended trips to Montana.

...More of the Canadian tourist households (84%) than of U.S. tourist households (65%) take extended trips (seven or more nights away from home).

...The average number of extended trips Canadians take is also higher (1.46 vs. 1.16), although the average number of all pleasure trips is not higher (3.57 vs. 3.80). Therefore, a higher proportion of Canadian trips are extended (1.46/3.57 = 41%) than are U.S. pleasure trips (1.16/3.80 = 31%).

...In addition, a higher proportion of Canadian tourist households take trips to Montana (8%) than do U.S. tourist households (3%).

...However, the proportion of Canadian households taking extended trips to Montana (2%) is not higher than it is in the U.S. (2%).

Since the Canadian prime market is located in Alberta, it is not surprising that many Canadians vacation there (52% any trip, 13% extended trip). But the proportion going to British Columbia is even higher (59% any trip, 38% extended trip). Thus, British Columbia appears to be a major competitor for tourists in the Canadian prime market.

Among U.S. prime market tourists, the most popular destination is California (38% all trips, 19% extended trips). In fact, this "warm weather" destination is also popular among Canadian tourists (18% all trips, 16% extended trips).

COMPARISON OF U.S. AND CANADIAN TOURISTS' TRIP CHARACTERISTICS

	ALL VACATION TRIPS		EXTENDED TRIPS	
	U.S.	Canada	U.S.	Canada
	%	%	%	%
Proportion of tourist households taking trip	100	100	65	84
Average number of trips taken	3.80	3.57	1.16	1.46
Selected Destinations Visited				
Montana	3	8	2	2 ←
Alberta	1	52	1	13
British Columbia	8	59 ←	2	38 ←
Idaho	5	1	2	-
California	38 ←	18	19 ←	16
Colorado	13	-	6	-
Oregon	17	1	6	1
Washington	19	6	2	1
BASE	505	100	505	100

B. Activities And Seasons

While substantial proportions of both groups plan summer nature-oriented trips, Canadians are also oriented towards water and winter activities, representing markets for potential expansion.

...Most Canadians plan to take a winter pleasure trip (67%) but only half of the U.S. tourists plan one (49%). Most of both groups plan to take summer trips (77% U.S. and Canadian).

...In particular, Canadian prime market tourists are more likely to say they will go skiing this winter than are U.S. tourists (31% vs. 14%). Increasing its proportion of this winter market would decrease Montana's dependence on summer tourism.

...In both summer and winter, Canadians are more likely to participate in water activities on their pleasure trips than are U.S. tourists (24% vs. 17% in summer, 14% vs. 5% in winter). This is probably attributable to the lack of large, convenient water bodies in land-locked Alberta. Montana could promote its water facilities in this market, emphasizing its proximity compared with the Pacific shore offered by British Columbia.

...Also, large proportions of both groups say they plan wilderness activities on summer trips (28% vs. 26%). the type of activities available in Montana.

PLANNED ACTIVITIES ON FUTURE VACATIONS

Planned Trip Activities	U.S. %	Canada %
Plan To Take Summer Trip	77	77
Water Activities (Net)	17	24
Swim/surf/sunbathing	12	21
Boating	6	4
Other	2	2
Wilderness Activities (net)	26	28
Sightseeing (net)	16	18
Visit friends and relatives	12	5
Rest and relaxation	6	13
Do not plan summer trip	22	23
Plan To Take Winter Trip	49	67
Water Activities (Net)	5	14
Swim/surf/sunbathing	5	13
Boating	*	1
Other	*	-
Skiing	14	31
Wilderness Activities (net)	5	2
Sightseeing (net)	6	11
Visit friends and relatives	10	7
Rest and relaxation	5	8
Do not plan winter trip	49	33
BASE	505	100

* Less than 0.5%.

While Montana is a destination to visit in the summer for most U.S. prime market tourists, this is not nearly so true among Canadian prime market tourists.

...Summer is the season in which most U.S. tourists plan to go to Montana (66%). No other season is nearly so popular in this market.

...However, winter is about as popular as summer among Canadian tourists (30% vs. 36% intended trips).

The apparent resistance among U.S. tourists to visit may be related to their view that Montana is too cold in the winter. For those living north of Montana -- such as tourists in the Canadian market -- temperature is not a barrier. Of course, Montana cannot compete with warm-weather destinations such as California, Mexico, and Hawaii, which draw large numbers of winter-weary Canadians. Still, the strong orientation towards skiing and winter trips might be exploited to attract a greater non-summer tourist flow.

SEASON OF MONTANA PLEASURE TRIPS

	INTENDED TRIP	
	U.S.	Canada
	%	%
Summer	66	36 ←
Fall	15	18
Winter	12	30 ←
Spring	8	18
BASE	85*	33*

* Those who intend to take a pleasure trip to Montana in the next year or two.